2003 SURVEY OF CONSUMERS AT MICHIGAN AGRITOURISM OPERATIONS

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Introduction

Agritourism is an increasingly important segment of the $3 trillion worldwide tourism industry. Certain psychographic and demographic trends favor future growth of the agritourism market. First, the American Recreation Coalition's "Outdoor Recreation in America in 1998" survey shows continuing upward trends in outdoor recreation, including farm-based activities (Maetzold 2000). Two important market segments, baby boomers and seniors have in part fueled this upward trend in nature-based tourism. A Values and Lifestyles (VALS) survey conducted by Stanford Research International found that 30 million of the total 75 million American 'baby boomers' born between 1945 and 1963 have psychographic characteristics emphasizing environmental concern, social awareness, a global view and personal growth. These 'green' consumers, who are well-traveled, well-educated, professional, and have high income levels, are considered the core of the U.S. ecotourism and agritourism market (Wood 2002). Seniors are also a key market for agritourism, given their disposable income and leisure time. Agritourism also appeals to the growing number of family-oriented tourists (i.e. baby boomers and seniors traveling with children and grandchildren respectively) by providing hands-on, educational activities that involve both children and adults (Mason 2000; Ragsdale and Real 2000). Agritourism also attracts the increasingly urban and suburban boomer and senior populations who are a few generations removed from the farm and who hold nostalgic and romanticized views of rural, agricultural areas that contrast with negative views of urban areas.

Michigan agricultural producers, faced with declining commodity prices, rising production costs, and increased global competition, have looked at agritourism, a growing segment of the tourism industry, as a way to save the farm as well as provide customers with personalized service; high-quality, fresh food; and farm, nature, and family experiences. While previous research on agritourism indicates that it taps into consumption-related trends in American society, for Michigan farmers, it is important to assess who patronizes Michigan agritourism operations and what brings them on-site. Thus as part of a larger, joint Michigan Department of Agriculture (MDA) and Western Michigan University (WMU) agritourism project supported by the U.S. Department of

Agriculture (USDA), visitors to Michigan agritourism destinations were surveyed in order to determine their demographics and consumption decisions . The methodology of and results from the WMU/MDA agritourism consumer survey study follow.

Methodology

To specifically obtain information on the demographics and consumption decisions of visitors to Michigan's agritourism destinations, a team led by Sandra Hill (MDA) and Dr. Deborah Che (Geography, WMU) developed a survey of consumers at agri-tourism operations in Michigan. This survey was developed from ideas and opinions of agritourism operators gathered as part of three focus groups, each consisting of six to nine firm owners, conducted in 2002 by members of the project team. Based on the results of these focus groups held in Kalamazoo, Ellsworth, and Flint, a comprehensive consumer survey was developed by researchers at WMU in conjunction with experts at the MDA. The consumer survey contained questions regarding the respondents' traveling party, distance traveled, home zip code of residence, site-specific visiting patterns (past, present, and future), visitation to other agritourism operations within the last 12 months, means of learning about the agritourism operation, activities enjoyed and products purchased on the day of visitation/survey, and Likert-type questions designed to identify opinions related to the reasons for the visit.

Once the survey instrument was evaluated by the MDA, MDA staff conducted surveys on-site at agritourism operations (both farm and farmers markets) around the state of Michigan during August–October 2003. Approximately 50 surveys were conducted at each of the 31 sites. There were a total of 1550 respondents to the WMU/MDA survey. Once the surveys were collected by MDA and sent on to WMU-Geography, data was entered into SPSS and statistical calculations completed. The following sections and appendices feature figures and results from the data analysis. Additionally, GIS maps showing where surveyed visitors came from (using their home zip codes) were created for each of the 31 agritourism operations (Appendix 1).

Survey Demographics

The WMU/MDA consumer survey included 1550 respondents. Including all persons accompanying the survey respondents to the agritourism businesses, more than 4,390 persons participated in the project.

A typical group of agritourism visitors included 2.82 persons (standard deviation = 2.825), with a range from one person to a high of fifty-two persons (Figure 1). Groups of one or two persons accounted for 957 of 1550 surveys (61.9%), while three person groups accounted for 12.81% of the sample. Groups of four persons accounted for 11.97% of the sample. Groups with five or more persons in their party accounted for 13.32% of the survey. There are two different types of customers visiting these businesses: 1) younger or older couples or individuals, and 2) families with one or more children.

Sixty percent of the persons in the sample of 4,360 persons who provided information on gender in the survey were female. Thirty people did not fill out this question.

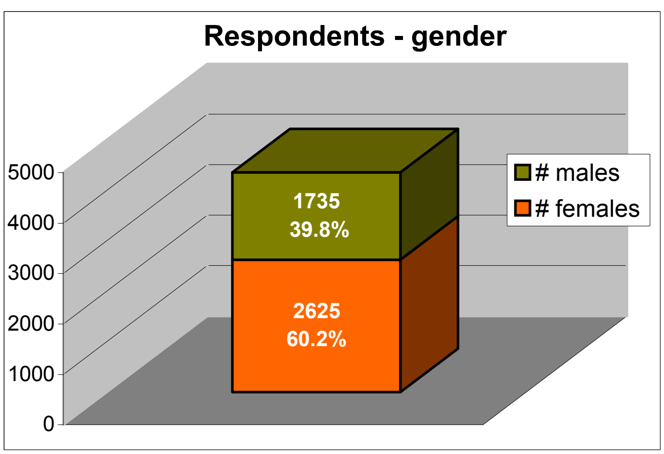


Figure 1: Survey participants and their groups divided by gender.

Taking the sample as a whole, 29.52 % of visitors were children or young adults under the age of 20. Of these, 177 were teenagers, a figure below expected numbers, but not surprising given that many of the three and four person groups were families with young children (Figure 2 and 3).

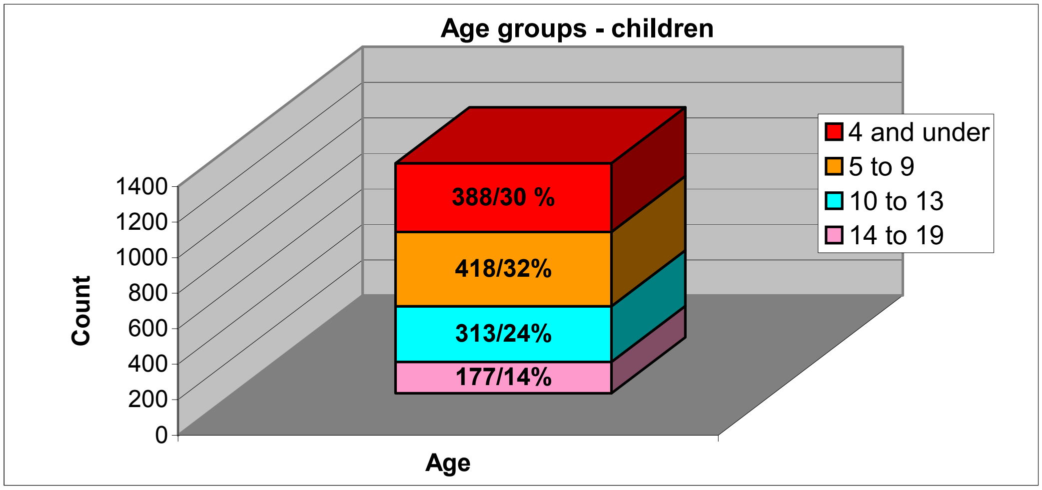
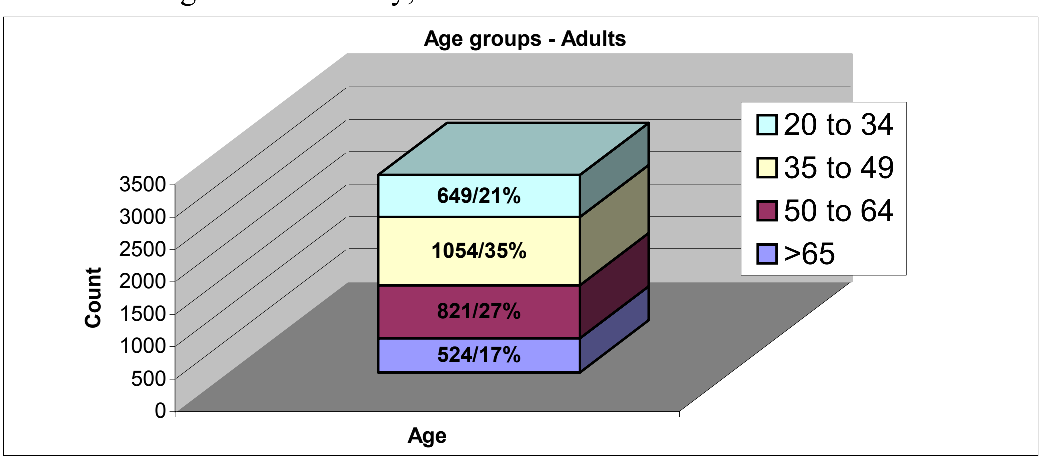


Figure 2: Distribution of Children by Age for Sample of 4,390 visitors to agritourism businesses participating in the WMU/MDA survey.

Turning attention to the adults that comprised 70.47% of total visitors, the largest group by our age categories was those between 35 and 49 (families in many cases). The number of 20-somethings was disproportionately low, suggesting that this segment of the population is less interested in agritourism activities. Alternately, more age-specific forms of advertising or programs may be required to increase their participation rates.

Figure 3: Distribution of adults by age group among respondents and their groups, WMU/MDA agritourism survey, 2003.



One of the more interesting aspects of the survey was the finding that once self-reported household income was over $30,000/year, there was no significant difference in attendance rates by income group. Families reporting annual incomes of below $29,999 were under-reported in the sample. This statistic may indicate that lower income families do not currently shop at on-farm venues, but it may also simply be an artifact of the survey. Remember that 327 respondents decided not to report their income and a disproportionate number of these may be families with lower incomes. What is certain is that families with incomes over $30,000 are as likely to visit agritourism operations as families reporting incomes in excess of $100,000.

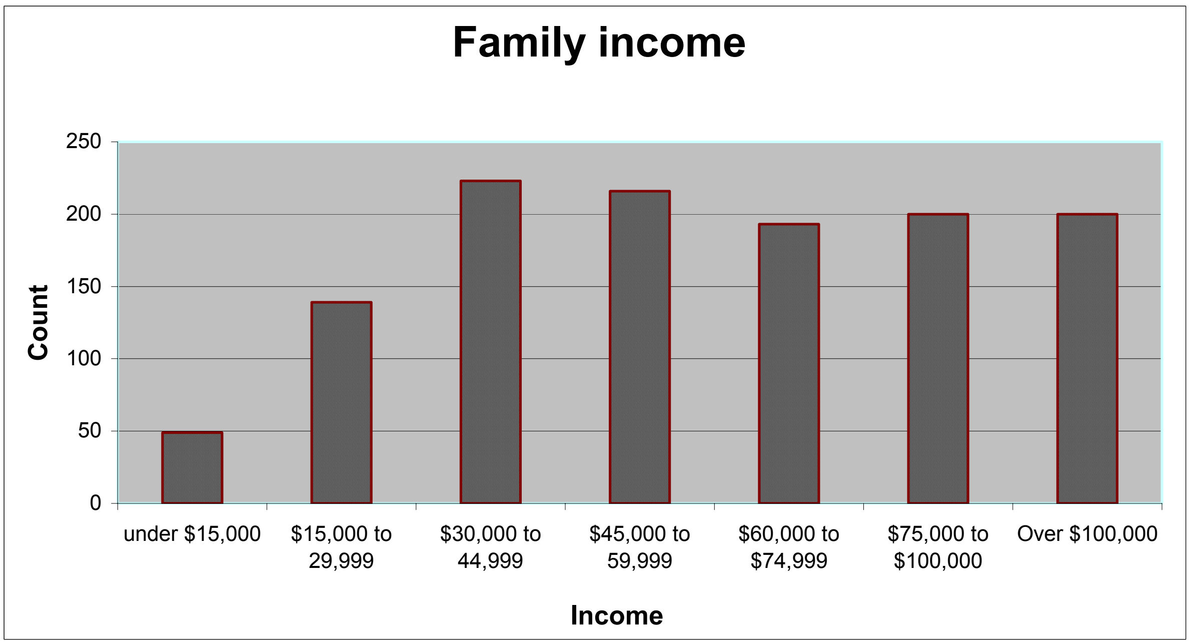


Figure 4: Self-reported family income for WMU/MDA agricultural tourism survey participants 2003 (n= 1223 as 327 refused to answer or did not know)

The distribution of all of the participants in the consumer survey may be found in Figure 5. The pattern reflects both the state's population distribution and the selection process for firms participating in the project. Only customers reporting in-state zip codes were mapped in this report, although for some of the firms such as Jollay Orchards, a significant percentage of customers came from Indiana and Illinois. Including all in state and out-of-state counties would have required severe reductions in the scale of the maps, rendering them illegible. More than 95.8% of our respondents reported a Michigan zip code as their zip code of residence. Appendix 1 includes maps indicating the dispersal of customers for each firm reporting more than 24 customers. This set of maps reflects the importance of local visitors to most of these firms. The exception to the overwhelmingly local visitors was those firms located in the Southwest portion of the state which draw tourists from Indiana and Illinois.

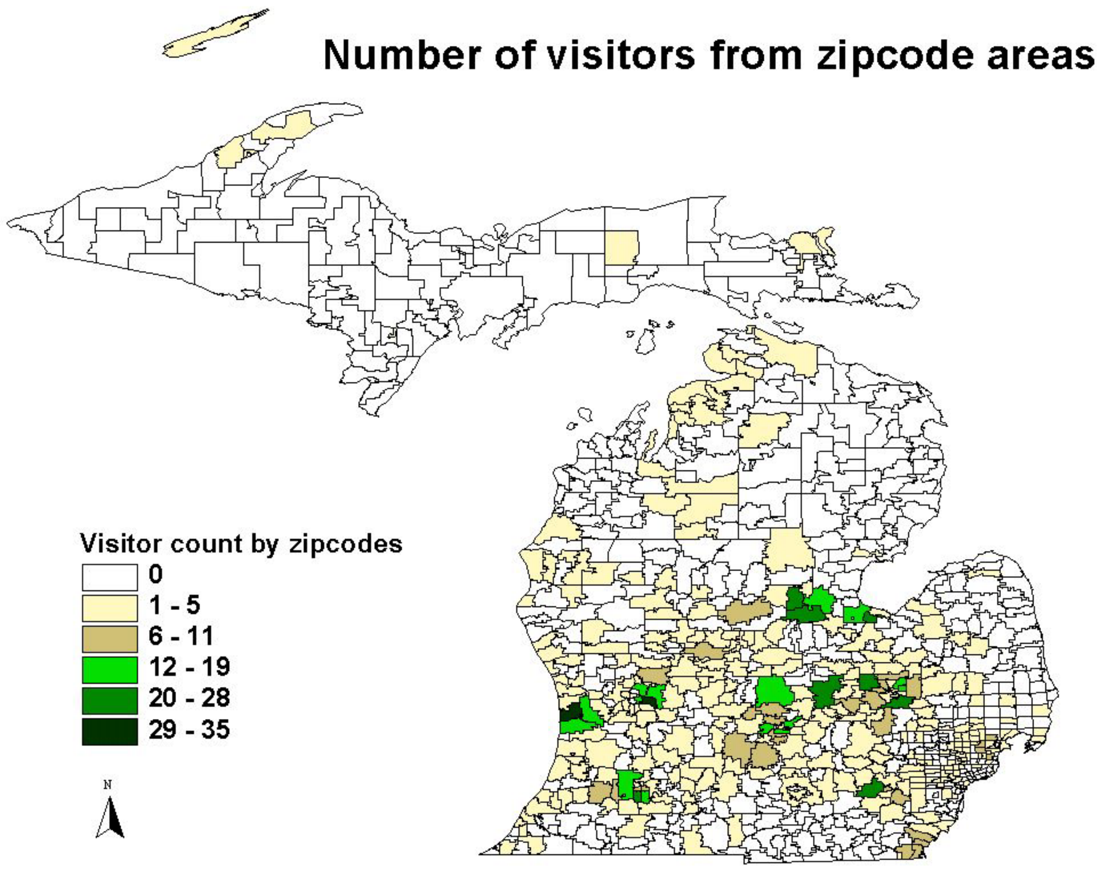


Figure 5: The residence location of all in-state survey respondents for the WMU/MDA agricultural tourism consumer survey.

Reasons for Visiting Agritourism Operations

Survey respondents were asked, in an open-ended question, to state “the most important why you came here today” for the operation where they completed the survey. While there were a variety of answers incorporated in the 1,528 responses, the most frequent answers related to the products the operations were centered on, or to a view that the visit was a family activity. The answers very clearly related to the particular places from which the surveys were distributed. The top answer, yielding over one-quarter of the responses (26%), related to procuring vegetables, such as “to buy fresh vegetables,” “to get fresh produce,” and “to pick vegetables.” The second most popular response (16.7%) related to obtaining apples, such as “to pick apples” or “to buy apples.” The third most cited response (7.2%) involved viewing the trip as a family activity, with answers such as “family outing,” “family fun,” “family party,” and “family trip.” Figure 6 displays the top eight responses to this question.

Reason	Frequency	Percent
To get fresh vegetables, fresh produce, to pick veg.	397	25.96
To pick or buy apples	253	16.55
Family outing, family fun, family party, family trip	111	7.26
To buy cider	90	5.89
To buy pumpkins	88	5.76
Fun for kids, kids’ activities, kids’ trip	72	4.71
To buy corn	70	4.58
To buy fresh fruit	67	4.38

Figure 6. Top Eight Main Reasons for Coming to the Agri-tourism Site

Respondents were also provided a number of reasons for visiting agri-tourism operations and asked how important, on a scale from 1 to 5 with 1 = not at all important and 5 = very important, each of those reasons were. By far, the most important reason for visiting the operations, with almost all (95%) of respondents agreeing that it was a “very important” or somewhat important” reason for visiting was “source of local, fresh products.” The next important reason, with 84% of respondents indicating agreement, was “good value.” The only two reasons that the majority of respondents did not feel were important were “experience nature” (47.6% agreement) and “learn to use farm produce” (29.7% agreement). Figure 7 displays the complete list of reasons, along with agreement by respondents.

Reason	Percent agreement*
Source of local, fresh products	95.0
Good value	84.0
Experience personal touch	73.5
Family or children’s activity	66.5
Convenient location	61.3
Visit farm lifestyle	50.8
Experience nature	47.6
To learn how to use farm products	29.7

*percent “agree” or “strongly agree” responses, on a 5-point scale with 1=strongly disagree and 5=strongly agree.

Figure 7. Agreement with Reasons for Visiting Agri-tourism Operations

Respondents were also asked to list the activities in which they participated in while at the operation. The most popular activity mentioned by respondents, involved, not surprisingly, activities involving fresh fruits or vegetables, such as picking fruit or buying fresh vegetables, with 14.5% of respondents listing it as at least one of their activities. The activity that was second most likely to be cited including shopping, in general, with 13.4% of respondents listing “shopping” or “browsing.” Other activities frequently listed included picking or buying apples, eating, hay rides, and petting or looking at animals. The top activities listed are shown in Figure 8.

Activities	Percent
Picking or buying fresh produce	14.6
Shopping, browsing	13.4
Picking apples, buying apples, buying caramel apples	12.1
Eating food, eating snacks	8.0
Petting, looking at animals	6.7
Hay rides, wagon rides	6.8
Buying pumpkins	5.5
Buying or making cider	5.4
Eating or buying donuts	4.5
Sightseeing, looking around	3.0

Figure 8. Activities at Operations

Importance of Returning Customers: Returning Customers Represent a Critical Proportion of the Customer Base

A number of questions were included in the survey to determine the visitation pattern of the typical adult filling out the survey. From these questions, it is clear that repeat business is critical to the economic health and well-being of these operations. Of the 1550 persons that responded to this question, 85.94% reported a previous visit (Figure 9), and 96.9% reported that they would return during 2003 or 2004 (Figure 10). The use of home mailings --common among the firms participating in our surveys would seem to be well founded in light of the "brand loyalty" exhibited by the respondents. To check on these questions, we also asked how many people had visited the agritourism business where they completed the survey prior to the day of the survey, reflecting past customer loyalty. Again, we found a consistently high pattern of support. Results indicated that 76% of respondents visited the business within two years, but only 56% of respondents came during the previous year. It well may be that visits are cyclical (Figure 11). It is also important to realize that most people participating in the survey regularly visit other agricultural tourism businesses. Of the 1548 people responding to this question, more than 70.82% reported visiting other agricultural tourism operations in the past twelve months (Figure 12). Direct mailings can be used to assure return business, but other forms of advertising should be used to assure an expanding customer base. Once people visit these operations, there is a very high probability that they will return.

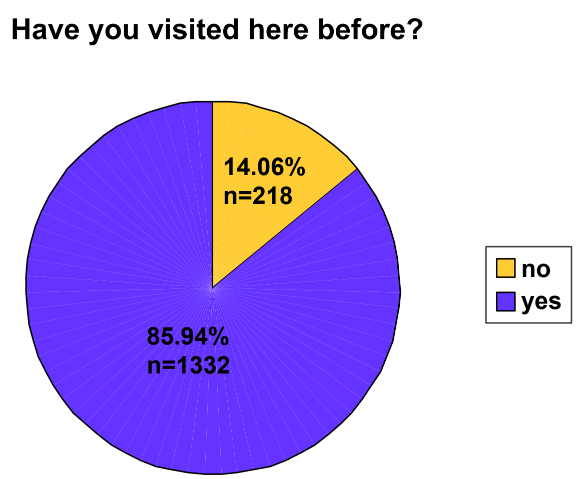


Figure 9: Previous visits to same agritourism business participating in WMU/MDA survey in 2003

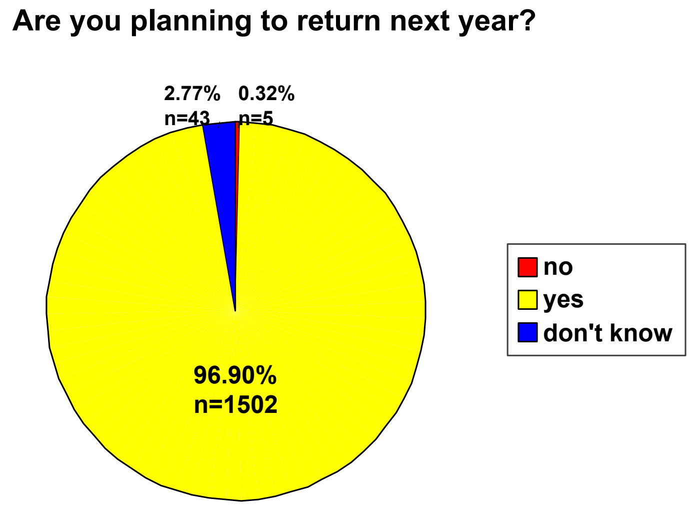
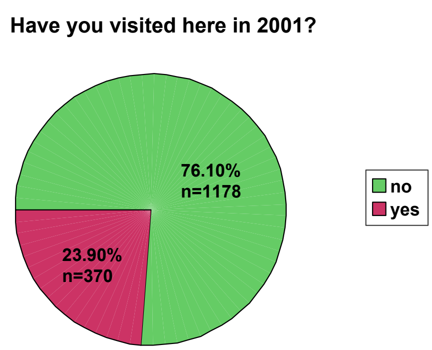


Figure 10: Proportion of customers planning a return trip to same agritourism business where they were surveyed in 2003.



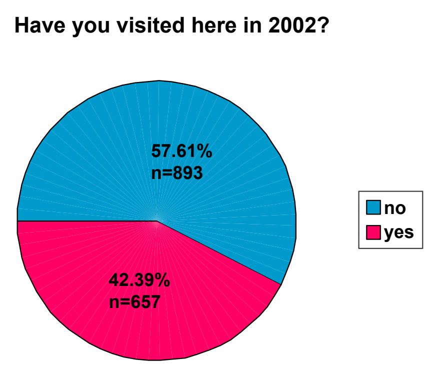


Figure 11: Past visits to same agritourism business where the customer was surveyed at 2001 and 2002. Survey was conducted in 2003 by WMU/MDA agritourism project.

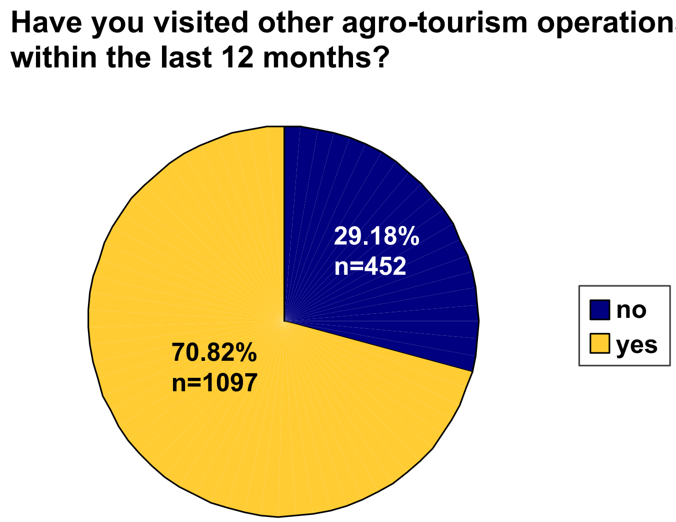


Figure 12: The "Agritourism" Enthusiast as a portion of the total consumer base for the WMU/MDA agritourism consumer survey.

Importance of Local Customers:
Customers may be closer than you think

Each respondent was asked to provide information on the trip that included their visit to the agritourism business where they completed the survey. Information on the actual miles traveled was collected as well as the zip code information presented above assuming that not all customers were coming directly from home or alternately returning to their home after their visit. The average number of miles traveled was 22.0 miles (standard deviation = 54.66), but the range was very large (from 1 mile to 1200 miles) reflecting the impact of out-of-state customers on the agritourism businesses of Michigan. While the long-distance customers certainly "grab" our attention, it should again be noted that many of the customers for these businesses are neighbors. Many customers live within 25 miles of the firms where they were surveyed and thus it is important to consider how critical these "home-grown" customers are to the financial success of many of these operations (Figure 13).

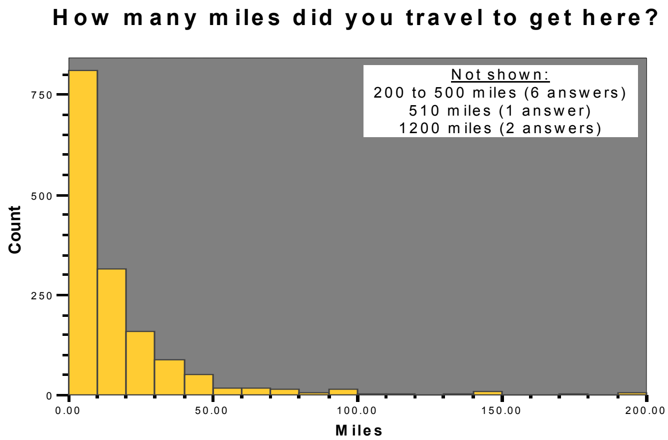


Figure 13: Distances traveled by respondents of the WMU/MDA agritourism survey: 2003

More than one-half of the respondents to this consumer survey lived within ten miles of the business. But there is still considerable potential for increasing customers living within thirty to fifty miles of the businesses. Appendix 1 provides a customer map for every firm participating in the survey with 24 or more customers. These maps again reflect the local character of the customer base of many of these firms. Of course, almost all of the business had customers from other states not depicted on these maps, but in most cases the “lion’s share” of customers are neighbors and nearby residents.

How Customers Found Out About Agritourism Operations

Respondents were also asked to indicate how they found out about the agritourism operations that they were visiting. The respondents were given six options, of which they could select as many as applied, including “saw when drove by,” “saw ad,” “read about in tourist literature,” “word-of-mouth,” “saw on Internet,” or “saw on sign.” Once again, the answers reflect the local nature of the customer base. The most popular response was “word-of-mouth” (37.9%), followed by “saw it when drove by” (25.9%). Very few respondents learned about any of the operations from the Internet or through tourist literature. The complete responses are shown in Figure 14.

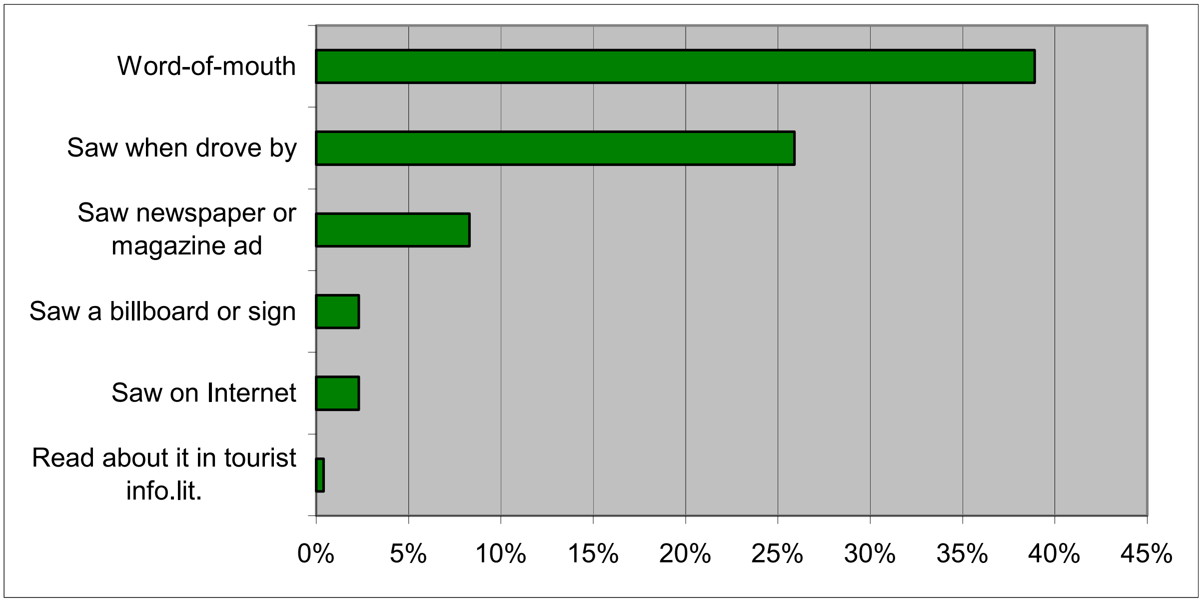


Figure 14. How Customers Found Out About Operations (%)

Conclusions and Recommendations

From the WMU/MDA consumer survey conducted at Michigan agritourism destinations, conclusions can be drawn about visitor demographics and consumption decisions. Reflecting the family nature of agritourism, many visitors (survey respondents and members of their accompanying parties) were part of families with young children. To attract teenagers and 20-somethings, whose numbers were disproportionately low, more age-specific programming might be necessary. Contrary to findings in the ecotourism and agritourism literature indicating that high income individuals are the core of the U.S. ecotourism and agritourism markets, our data showed the broader market appeal of agritourism. Once self-reported household income was over $30,000/year, there was no significant difference in attendance rates by income groups ($30,000-44,999, $45,000-59,999, $60,000-74,999, $75,000-100,000 and over $100,000).

The survey also revealed the importance of return visitors. Many respondents had previously visited the agritourism site where they were surveyed at, and almost all (96.9%) of customers surveyed indicated they were planning a return trip to the same business next year. Such return visits, which can be the ultimate verification of businesses' providing quality agricultural products and experiences, indicate a great deal of brand loyalty. Additionally over 70% of surveyed customers had visited other agritourism operations within the last 12 months, showing the importance of dedicated agritourists.

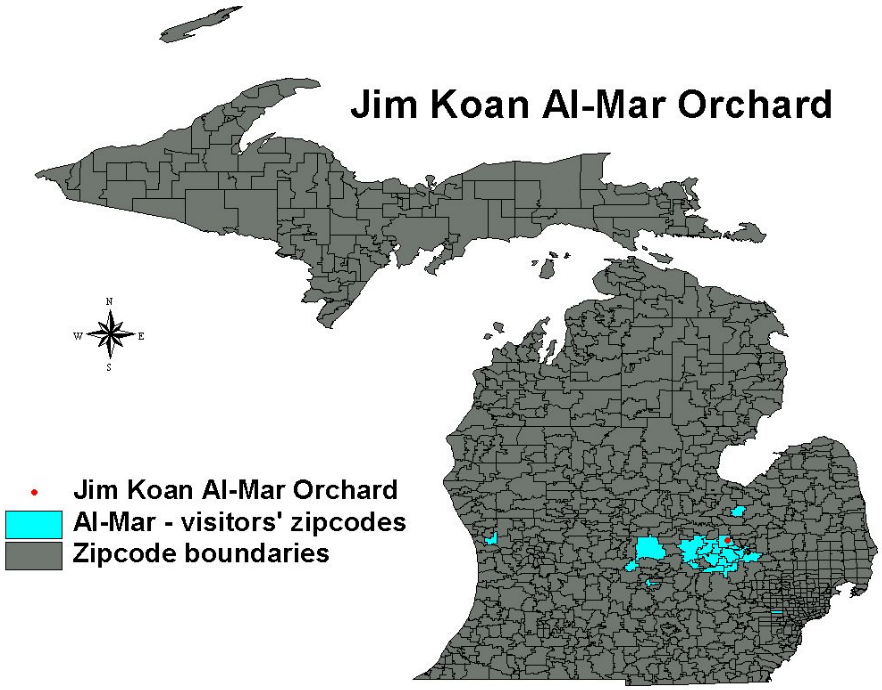
Many of the surveyed agritourism customers could be considered "neighbors." While the responses for the number of miles traveled to the agritourism destination varied widely, reflecting both the local and out-of-state customers, over half of the survey respondents indicated that they lived within 10 miles of the visited agritourism operation. Thus drive-bys, reflecting the fact that many agritourism visitors were neighbors and nearby residents, and word-of-mouth, possibly reflecting the importance of satisfied, return customers, were the most frequently indicated means by which people found out about the visited agritourism business. In contrast, the Internet and travel brochures were rarely cited as ways people found out about the agritourism business.

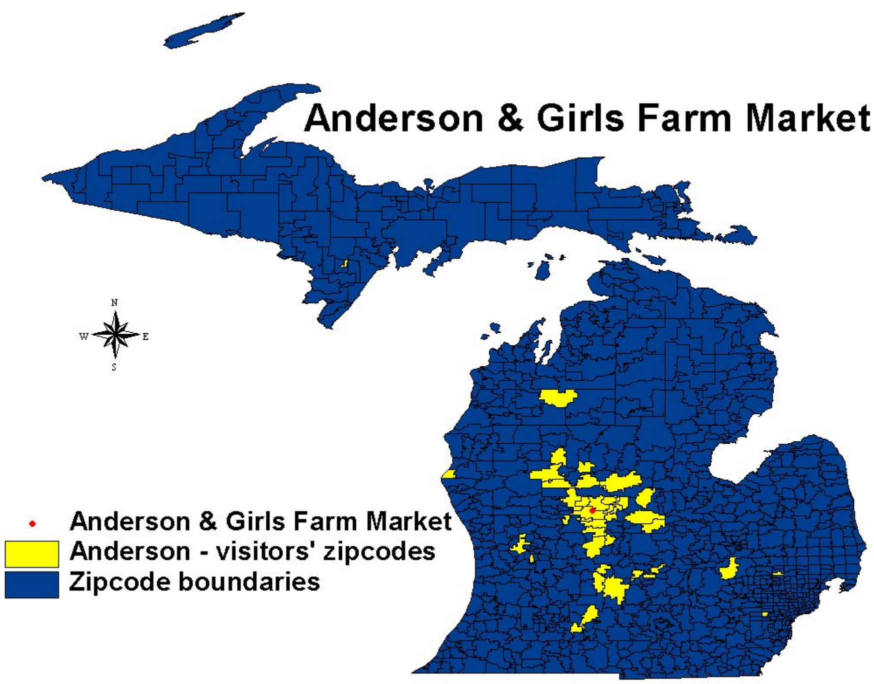
While such local and return visitors are crucial to the success of agritourism operations, potential exists to attract both more customers living 30-50 miles away from the business and out-of-state visitors. To attract these individuals who may be less likely to drive by a location or hear about the business from a family member or friend, the Internet, travel brochures, and greater promotional linkages with and support from Travel Michigan and convention and visitors' bureaus are critical to raising awareness about Michigan's agritourism destinations. Agriculture could be better integrated into existing state tourism promotion campaigns, by using a Michigan fruit (i.e., cherry, apple) as a focal point or symbol for visitors who are interested in the many activities connected to agriculture. Tourism promotion material could also stress the agriculture-related activities possible in Michigan such as visiting a cider mill or farm and picking your own pumpkin. Visiting cider mills could be highlighted as a Michigan's tradition one could take part in while participating in another tradition, the fall leaf color tour. In this way, agritourism could reach new people, who could then become return visitors and word-of-mouth promoters of Michigan agritourism.

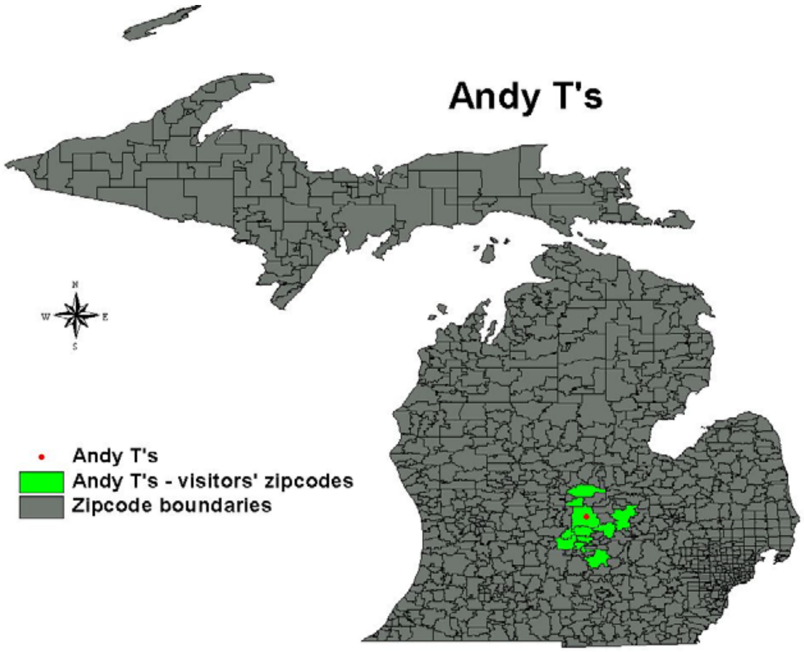
Purchasing/picking fresh, local vegetables, fruit, and produce ranked highest in terms of activities pursued and reasons for visiting the agritourism operation. Given this finding, promotions such as MDA's Select Michigan branding which emphasizes products' Michigan origin can be used at agritourism destinations to reinforce that the message that such businesses are sources of fresh, Michigan agricultural products.

Michigan agritourism producers should also use the tourism encounter to stress their quality production, which may help guarantee both continued, future purchases and agricultural production. Producers can convey both farming and processing quality and thus increase the more profitable on-site sale of Michigan agricultural goods. Stressing the quality and safety of local foods and American agriculture relative to cheaper, imported food via the agritourism experience can also help Michigan farmers deal with agricultural restructuring and globalization. Agritourism could thus provide the means to challenge imports from places with less-restrictive agricultural chemical use and help instill a high level of confidence in Michigan agriculture. Because agritourism visitors are interested in what they're seeing and knowing where their food is coming from, agritourism provides a chance to pitch Michigan agriculture and buy local instead of imported. The message linking agritourism with "healthy products that are grown locally," a way for people to keep in touch with agriculture (i.e., from the farm animals to getting out on the land and picking an apple off the tree or a pumpkin off the vine), and a means for increasing their understanding of agriculture could be conveyed to agritourists. Farm visits which communicate quality can help turn urban and suburban visitors into long-term customers and advocates of Michigan agriculture, which is especially important as farmers make up only 2% of Michigan's population.

APPENDIX 1: MAPS OF AGRITOURISM OPERATORS' CUSTOMERS






Andy T's
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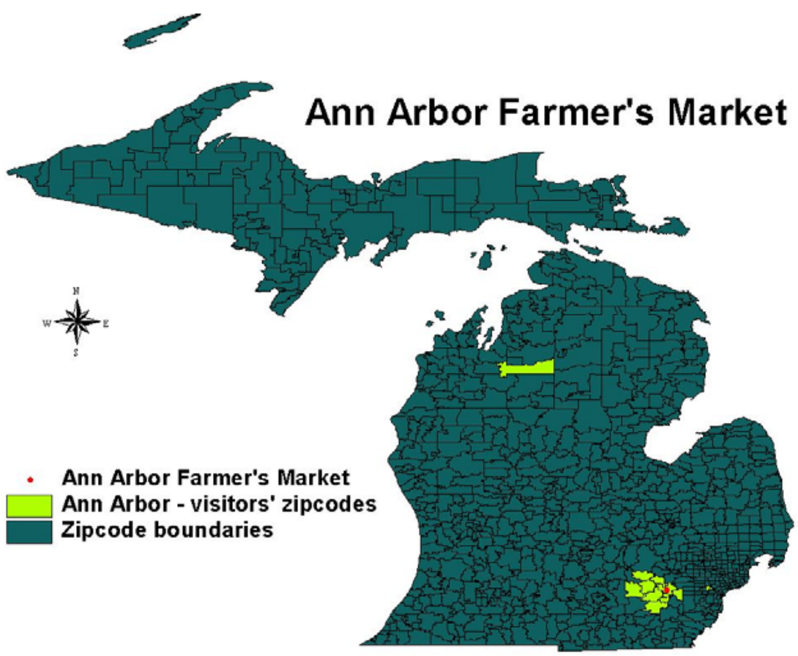
Andy T's
Andy T's - visitors' zipcodes
Zipcode boundaries


Ann Arbor Farmer's Market
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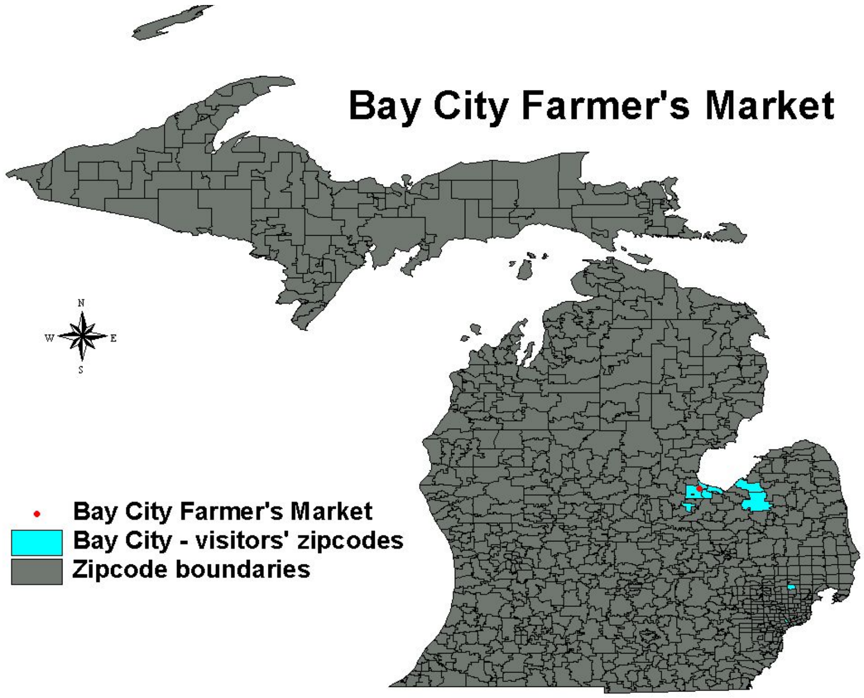
Ann Arbor - visitors' zipcodes
Zipcode boundaries



Bay City Farmer's Market
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Bay City Farmer's Market
Bay City - visitors' zipcodes
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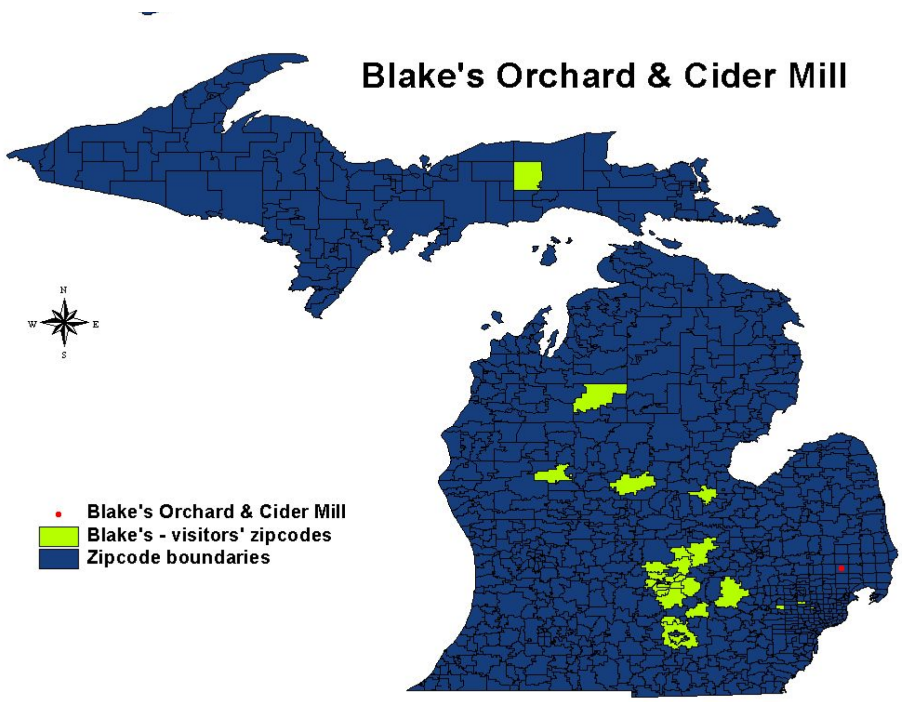

Blake's Orchard & Cider Mill
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Blake's Orchard & Cider Mill
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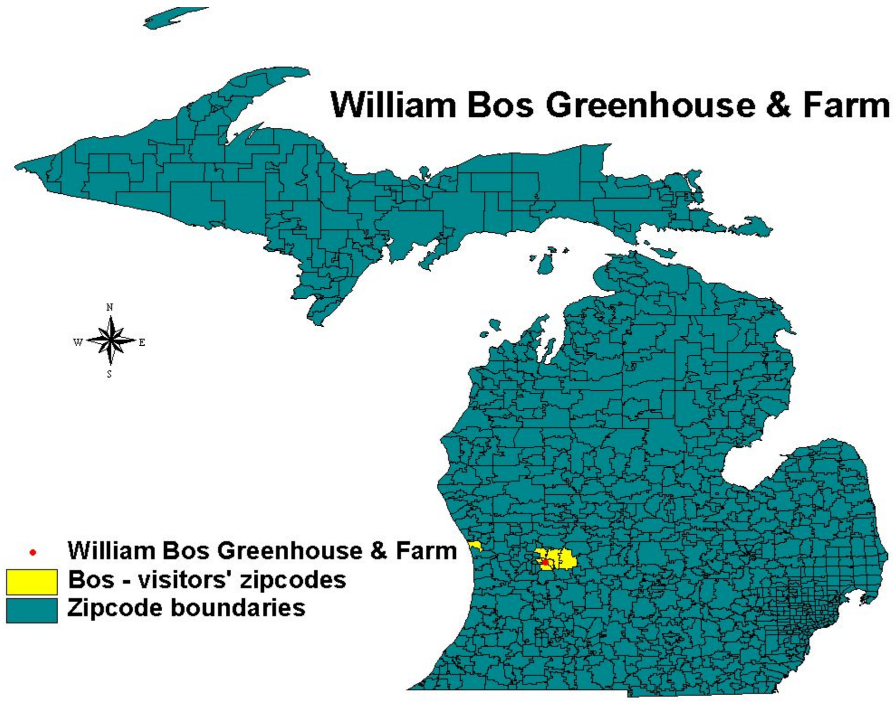
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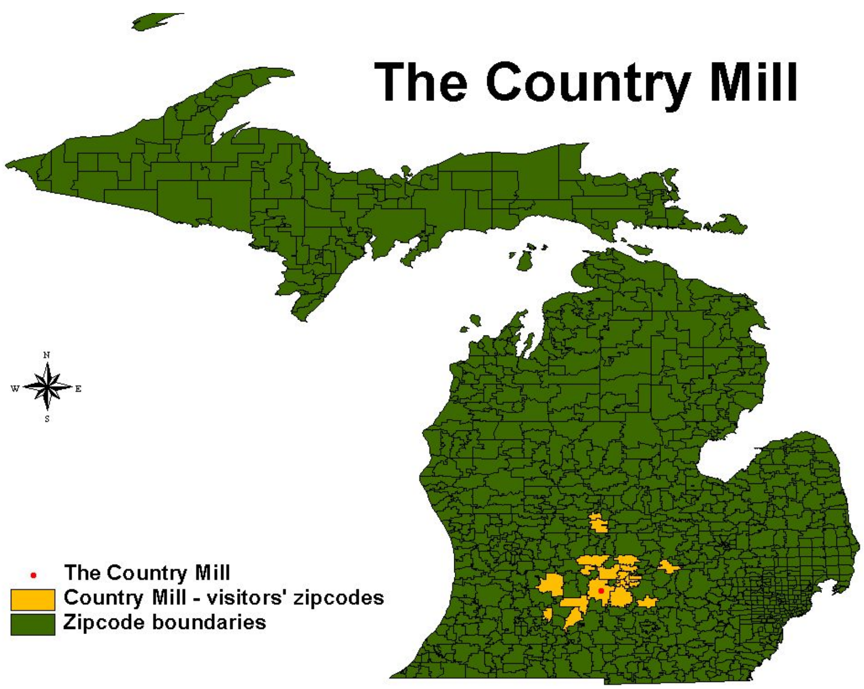
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Country Mill - visitors' zipcodes
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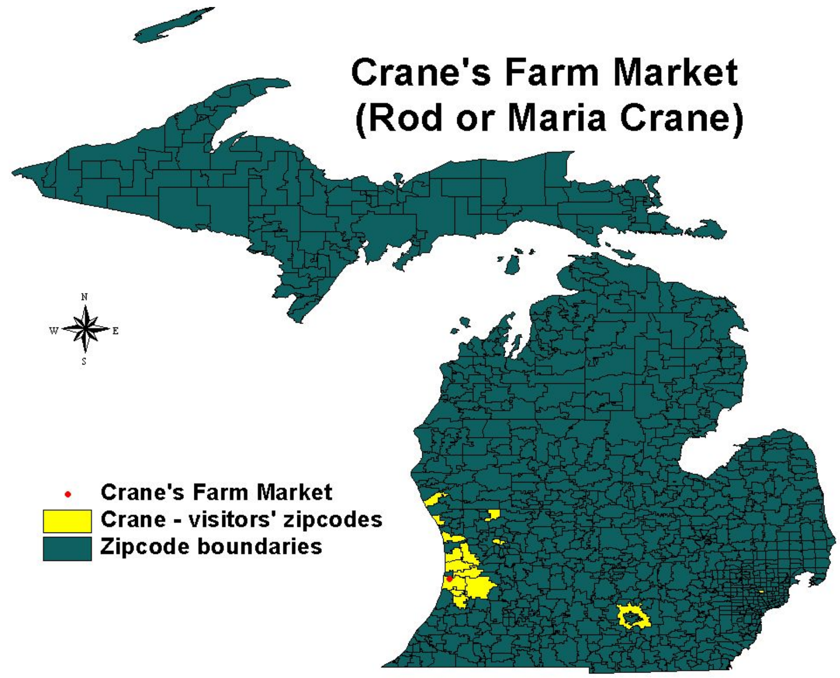
Crane's Farm Market
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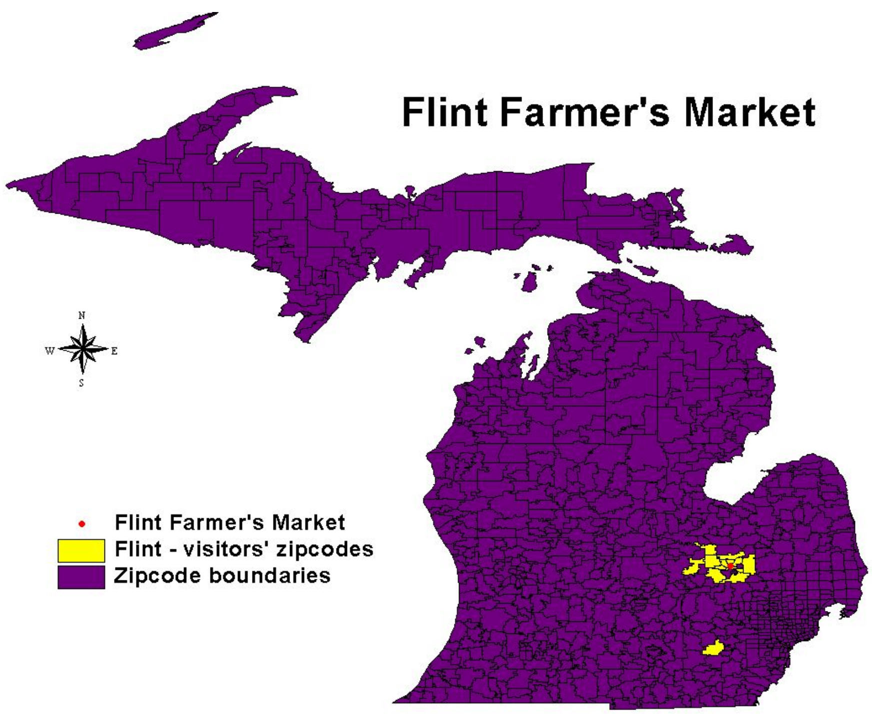
Crane's Farm Market
Crane - visitors' zipcodes
Zipcode boundaries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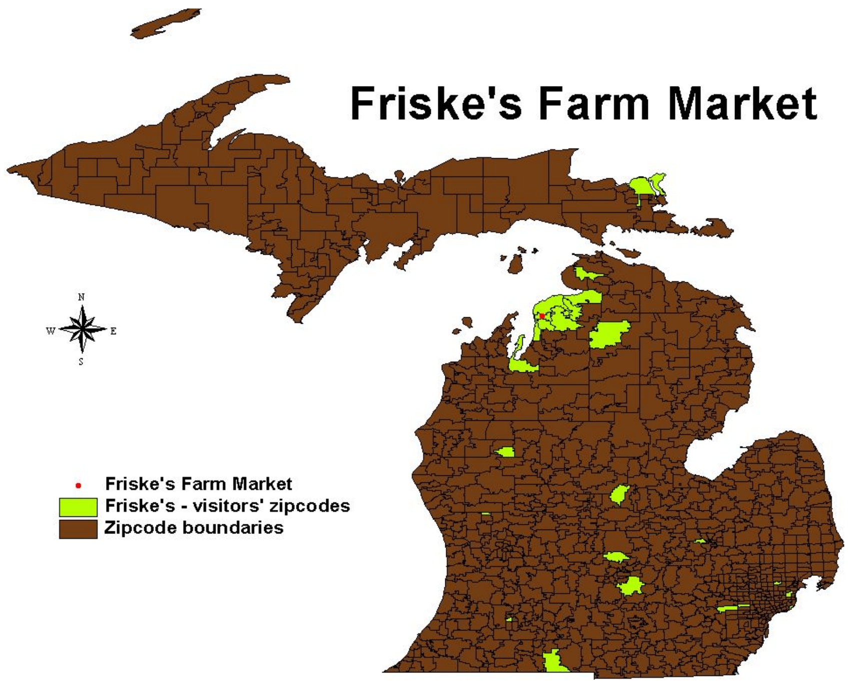
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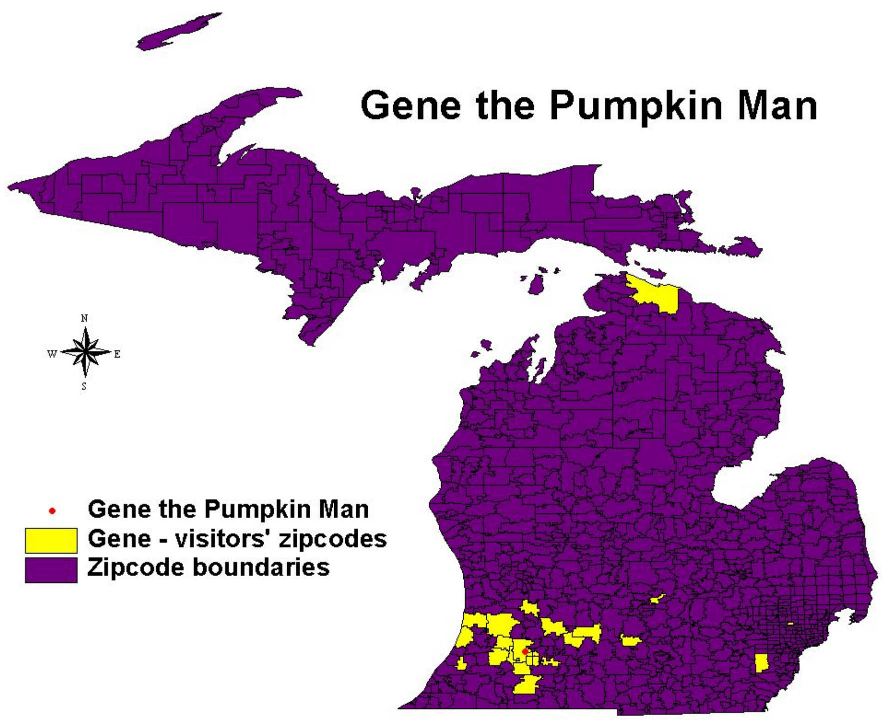
Gene the Pumpkin Man
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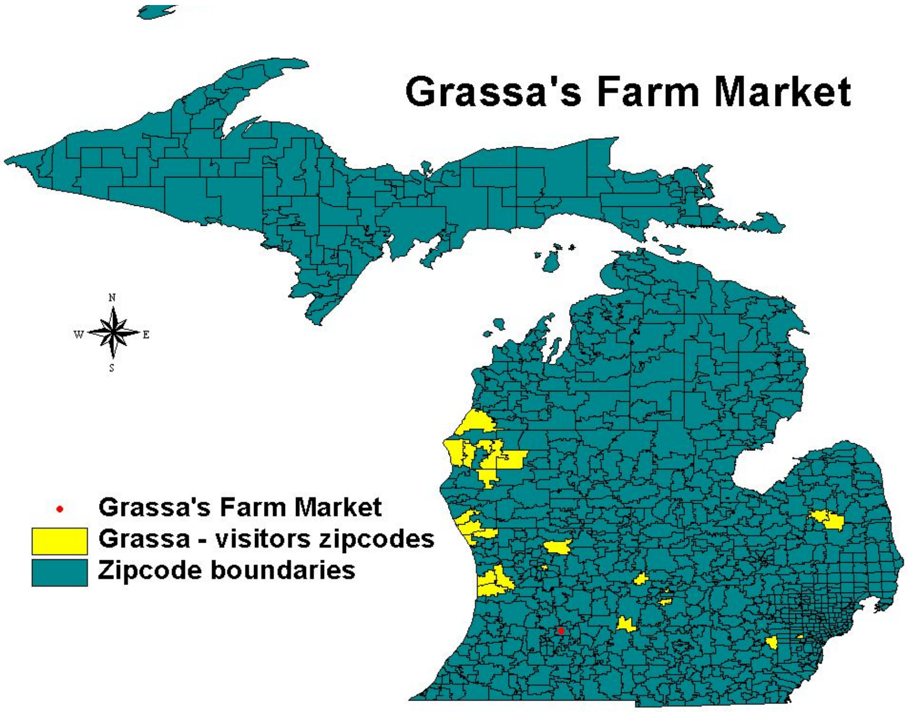
Gene - visitors' zipcodes
Zipcode boundaries


Grassa's Farm Market
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Grassa's Farm Market
Grassa - visitors zipcodes
Zipcode boundaries


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Holland - visitors' zipcodes
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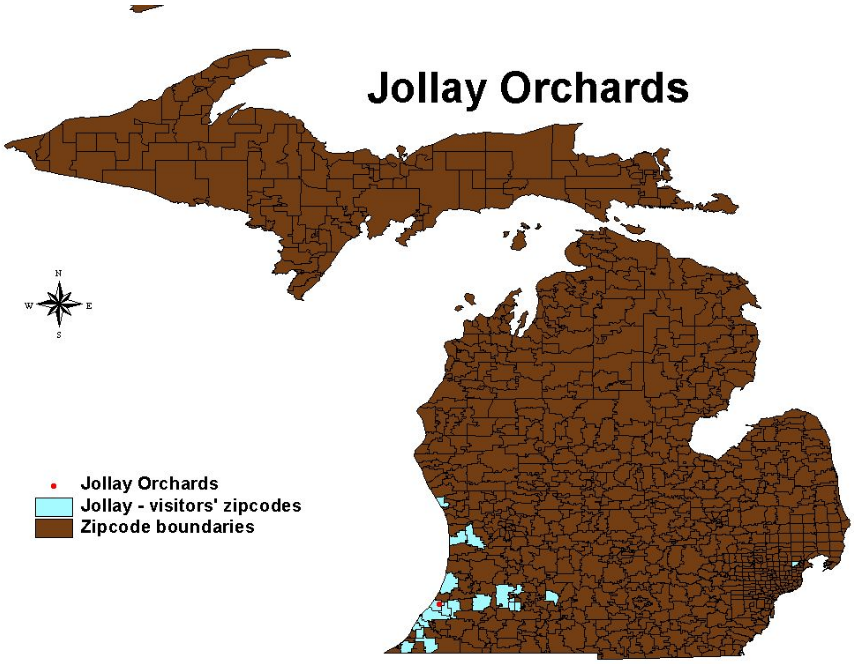
Jollay Orchards
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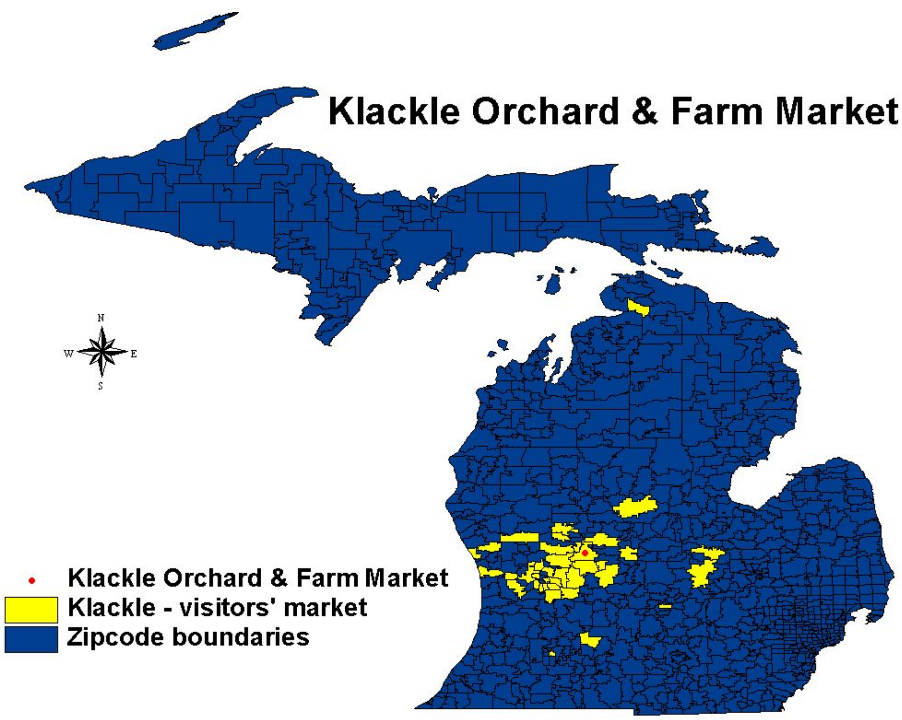
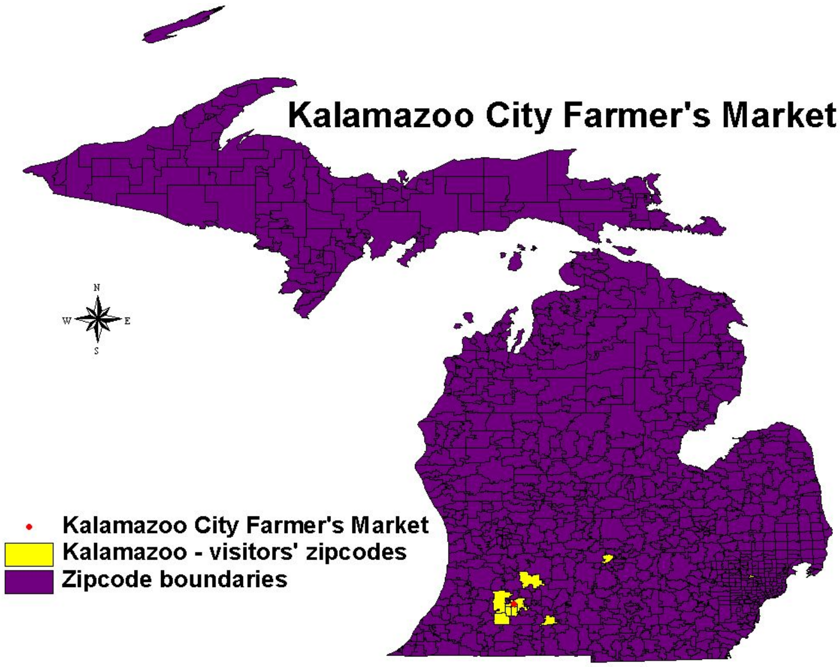
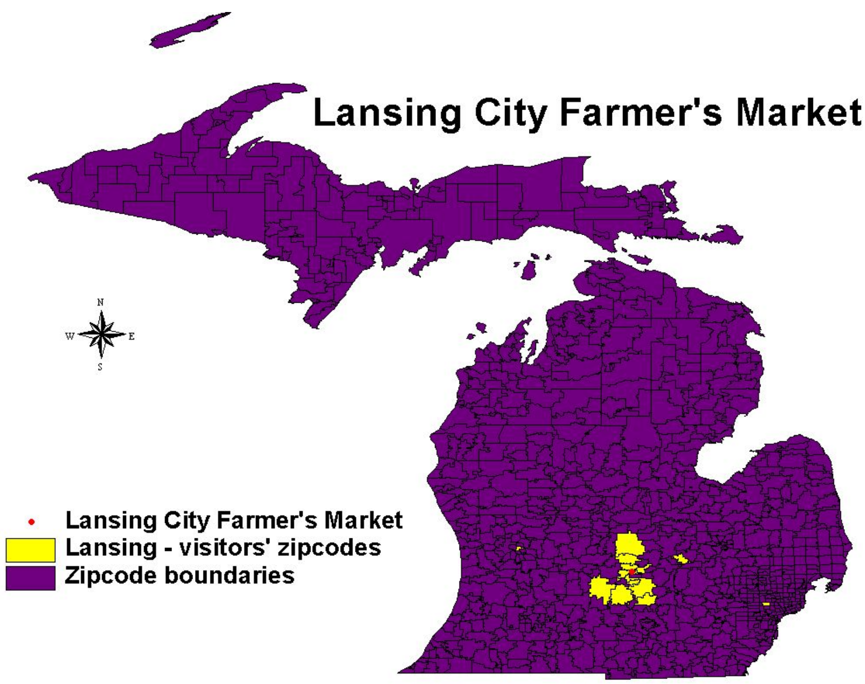
Jollay Orchards
Jollay - visitors' zipcodes
Zipcode boundaries

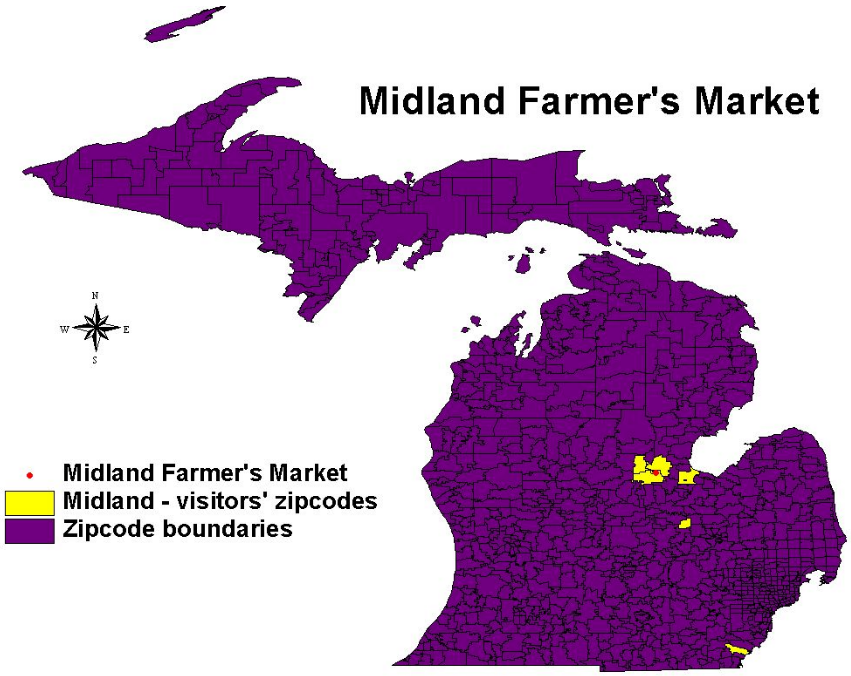

Klackle Orchard & Farm Market
N
W
E
S
Klackle Orchard & Farm Market
Klackle - visitors' market
Zipcode boundaries

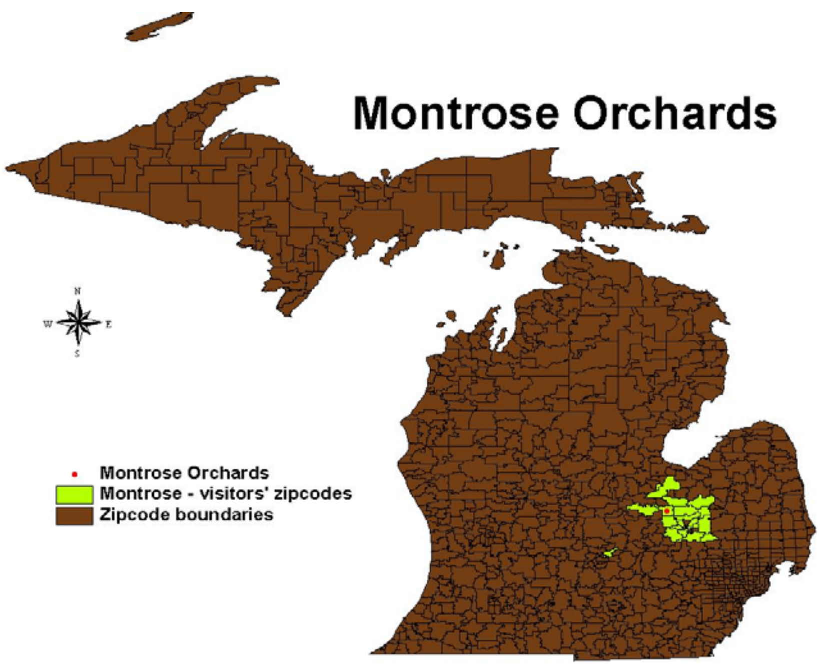


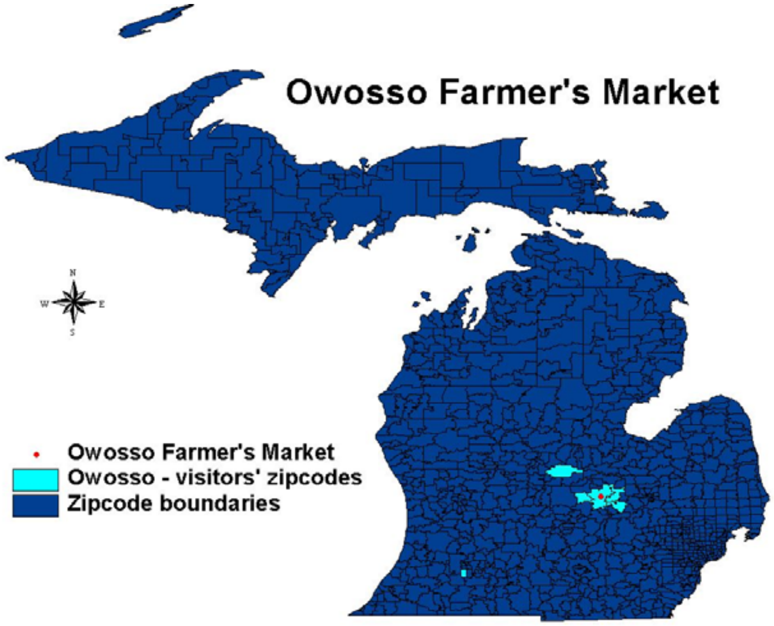
Kalamazoo City Farmer's Market
N
W
E
S
Kalamazoo City Farmer's Market
Kalamazoo - visitors' zipcodes
Zipcode boundaries

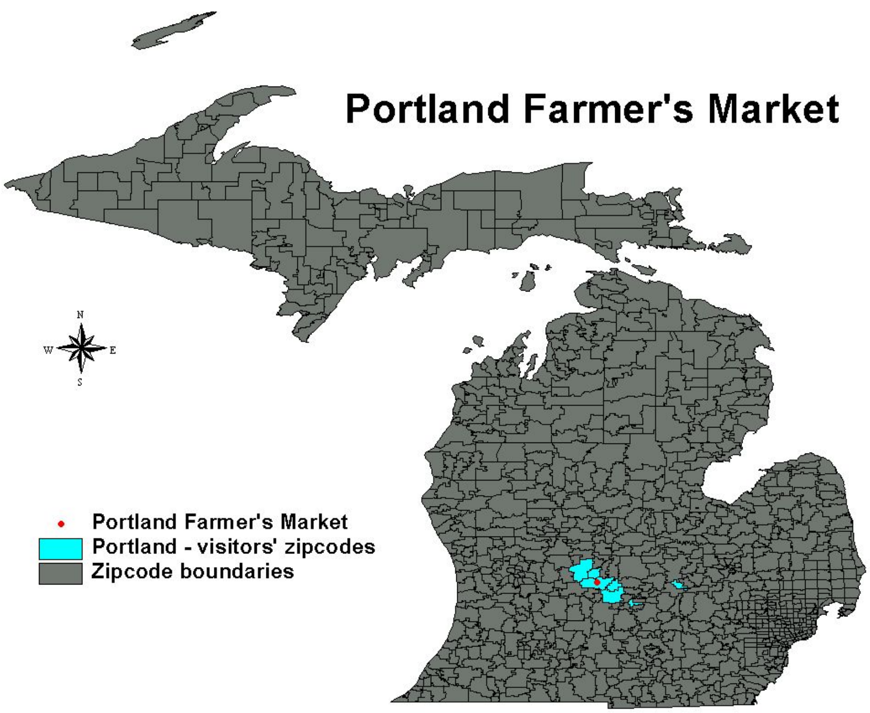


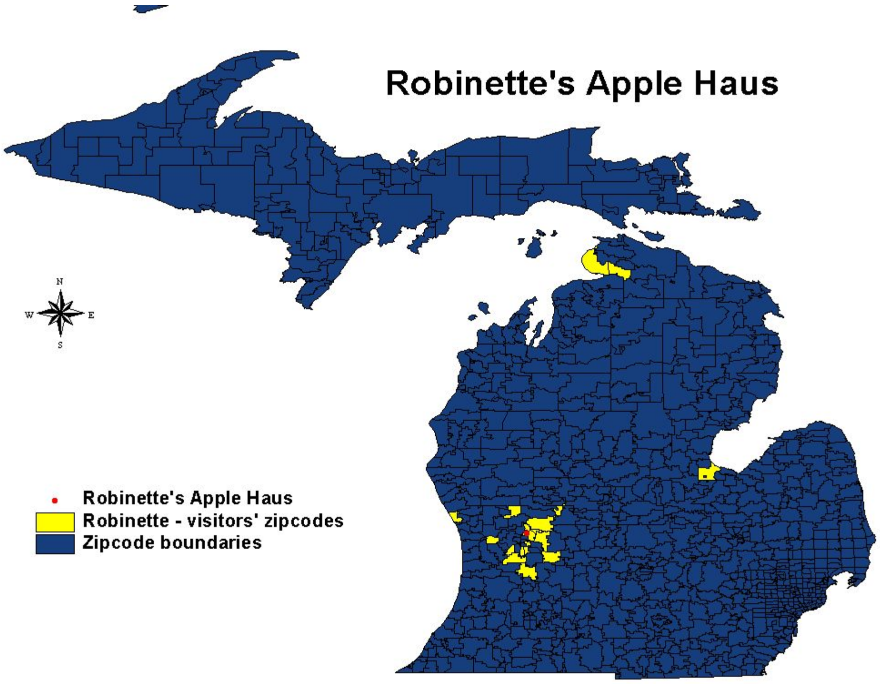
Lansing City Farmer's Market
N
W
E
S
Lansing City Farmer's Market
Lansing - visitors' zipcodes
Zipcode boundaries

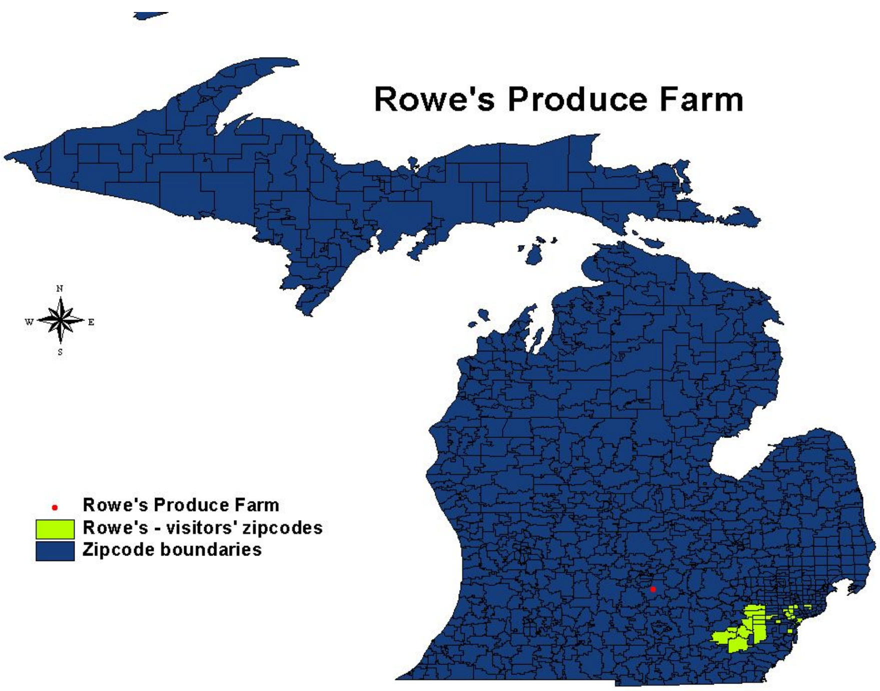

Midland Farmer's Market
Midland Farmer's Market
Midland - visitors' zipcodes
Zipcode boundaries

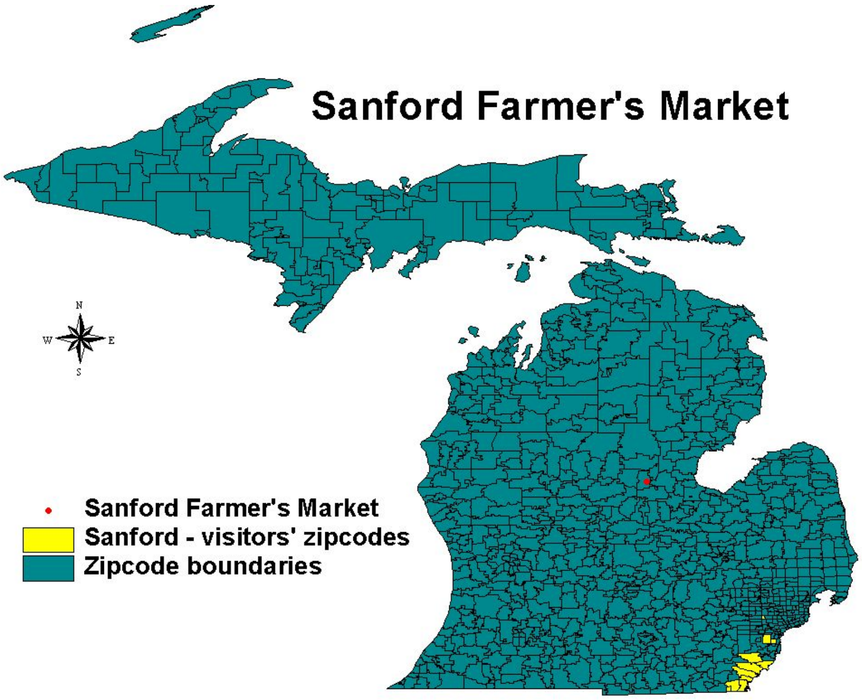

Montrose Orchards
Montrose Orchards
Montrose - visitors' zipcodes
Zipcode boundaries

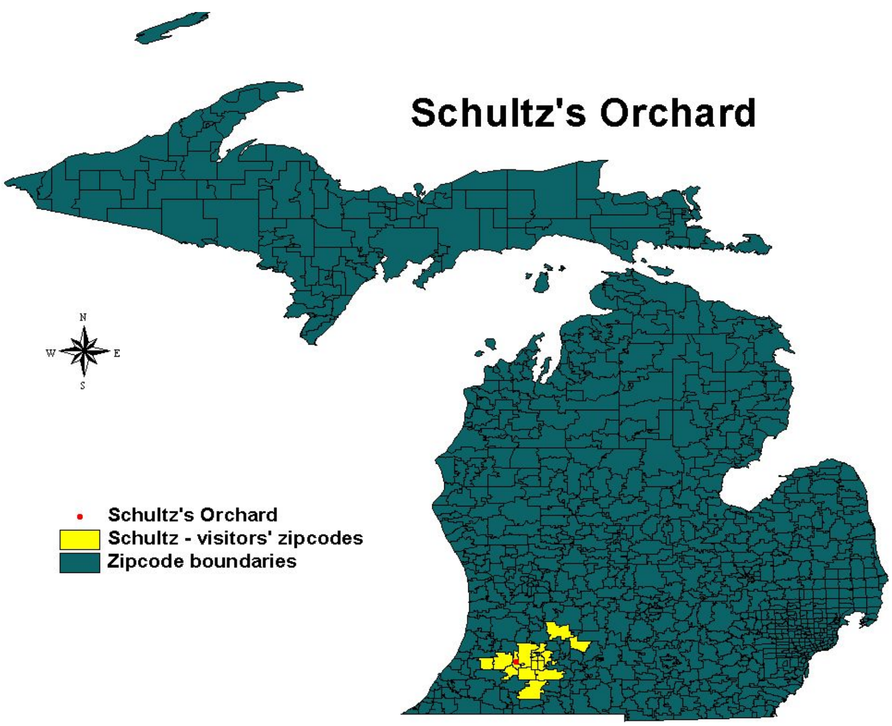

Owosso Farmer's Market
N
W
E
S
Owosso Farmer's Market
Owosso - visitors' zipcodes
Zipcode boundaries

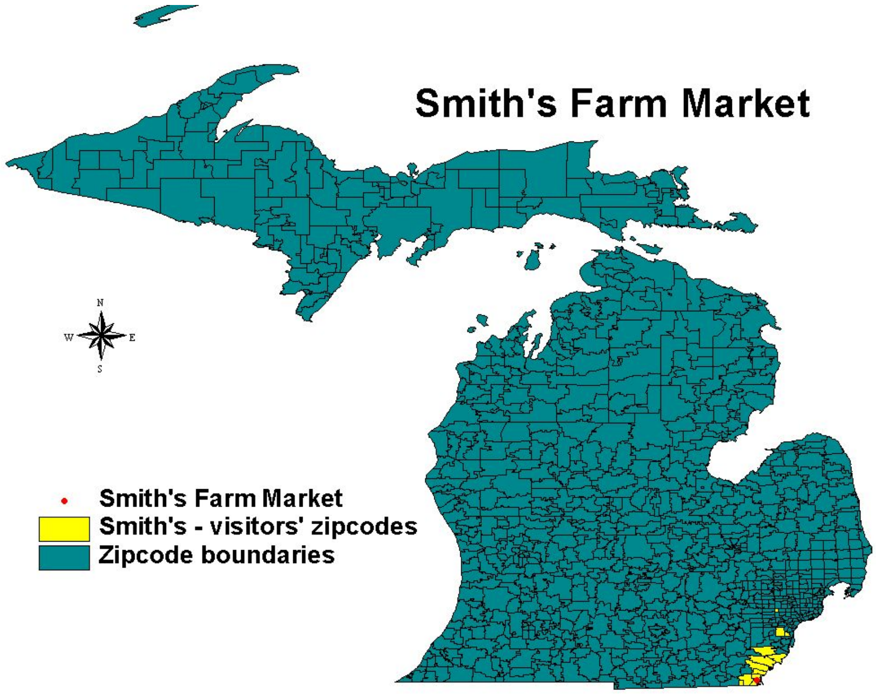

Portland Farmer's Market
N
W
E
S
Portland Farmer's Market
Portland - visitors' zipcodes
Zipcode boundaries

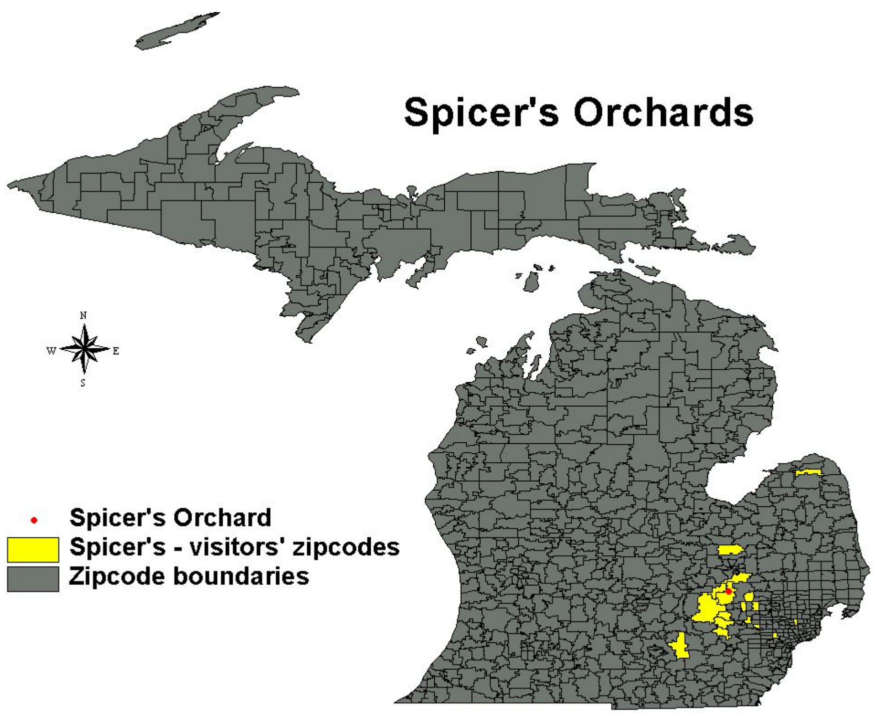

Robinette's Apple Haus
N
W
E
S
Robinette's Apple Haus
Robinette - visitors' zipcodes
Zipcode boundaries

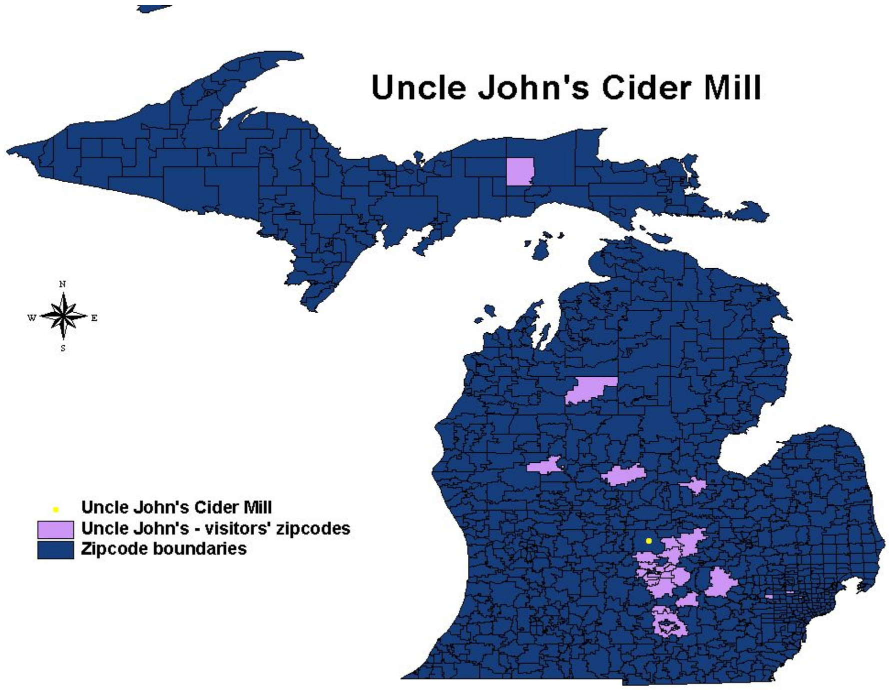

Rowe's Produce Farm
N
W
E
S
Rowe's Produce Farm
Rowe's - visitors' zipcodes
Zipcode boundaries

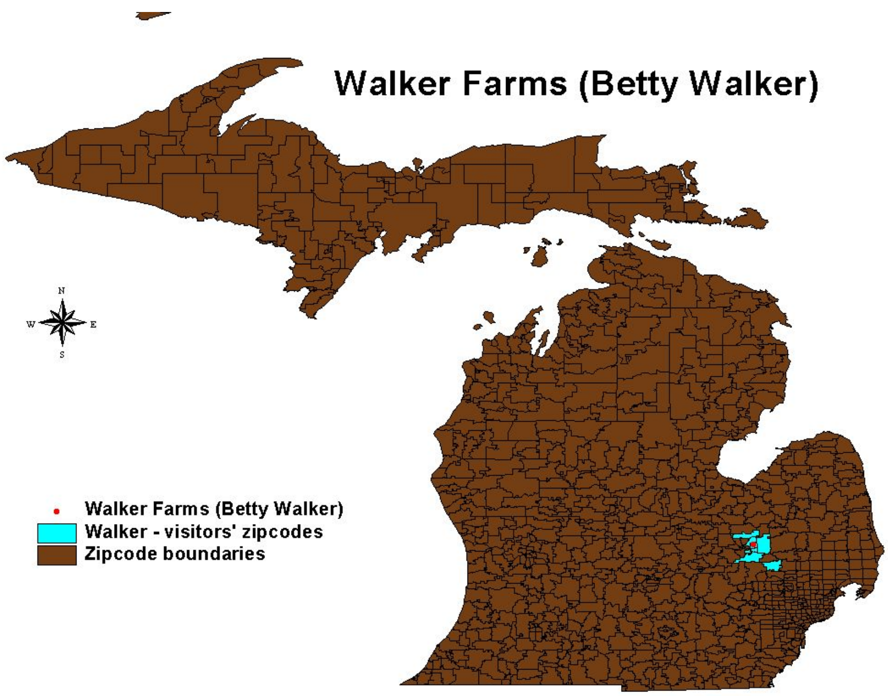

Sanford Farmer's Market
N
W
E
S
Sanford Farmer's Market
Sanford - visitors' zipcodes
Zipcode boundaries

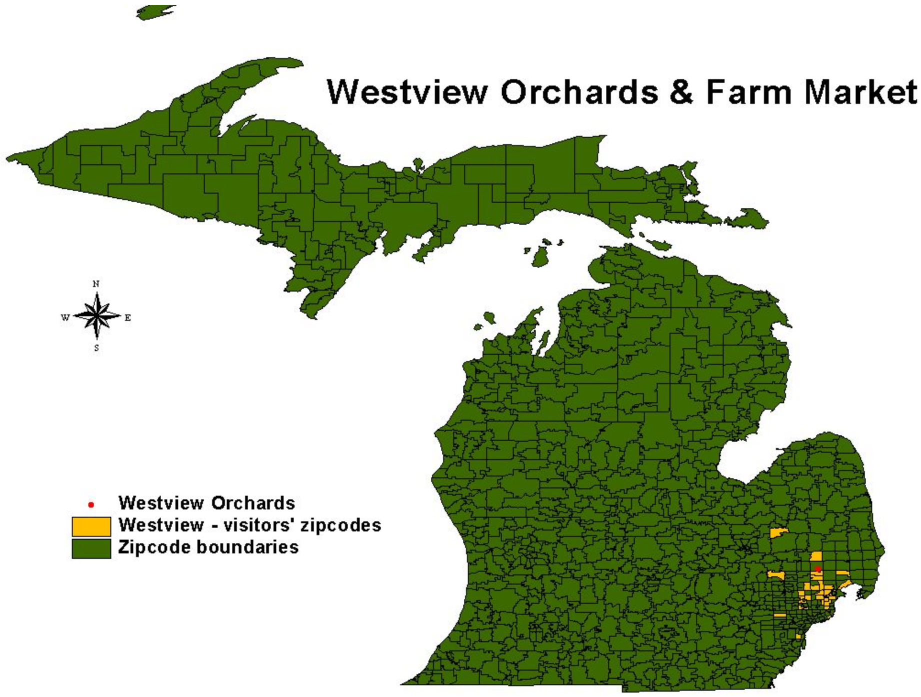

Schultz's Orchard
N
W
E
S
Schultz's Orchard
Schultz - visitors' zipcodes
Zipcode boundaries


Smith's Farm Market
N
W
E
S
Smith's Farm Market
Smith's - visitors' zipcodes
Zipcode boundaries


Spicer's Orchards
N
W
E
S
Spicer's Orchard
Spicer's - visitors' zipcodes
Zipcode boundaries


Uncle John's Cider Mill
N
W
E
S
Uncle John's Cider Mill
Uncle John's - visitors' zipcodes
Zipcode boundaries


Walker Farms (Betty Walker)
N
W
E
S
Walker Farms (Betty Walker)
Walker - visitors' zipcodes
Zipcode boundaries


Westview Orchards & Farm Market
N
W
E
S
Westview Orchards
Westview - visitors' zipcodes
Zipcode boundaries

APPENDIX 2: DESCRIPTIVE STATISTICS FOR SELECTED VARIABLES IN THE WMU/MDA AGRITOURISM CONSUMER SURVEY

Visited here before?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	no	218	14.1	14.1	14.1
	yes	1332	85.9	85.9	100.0
	Total	1550	100.0	100.0	

Visited here earlier this year?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	no	733	47.3	47.3	47.3
	yes	817	52.7	52.7	100.0
	Total	1550	100.0	100.0	

Visited here in 2002?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	no	893	57.6	57.6	57.6
	yes	657	42.4	42.4	100.0
	Total	1550	100.0	100.0	

Visited here in 2001?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	no	1178	76.0	76.1	76.1
	yes	370	23.9	23.9	100.0
	Total	1548	99.9	100.0	
Missing	System	2	.1		
Total		1550	100.0		

Plan to return next year?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	no	5	.3	.3	.3
	yes	1502	96.9	96.9	97.2
	don't know	43	2.8	2.8	100.0
	Total	1550	100.0	100.0	

Distance traveled?

	N	Minimum	Maximum	Mean	Std. Deviation
How many mile did you travel to get here?	1530	.00	1200.00	22.0368	54.66890
How many miles to next place?	339	.25	326.00	27.6409	43.68020
Valid N (listwise)	337				

Family income

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	Refused/don't know	327	21.1	21.1	21.1
	under $15,000	49	3.2	3.2	24.3
	$15,000 to 29,999	139	9.0	9.0	33.3
	$30,000 to 44,999	223	14.4	14.4	47.7
	$45,000 to 59,999	216	13.9	14.0	61.7
	$60,000 to 74,999	193	12.5	12.5	74.1
	$75,000 to 100,000	200	12.9	12.9	87.1
	Over $100,000	200	12.9	12.9	100.0
	Total	1547	99.8	100.0	
Missing	System	3	.2		
Total		1550	100.0		

Where will you go next?

		Frequency	Percent	Valid Percent	Cumulative Percent
Valid	home	1028	66.3	67.0	67.0
	other	506	32.6	33.0	100.0
	Total	1534	99.0	100.0	
Missing	System	16	1.0		
Total		1550	100.0		

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Ragsdale O and Real T 2000 Attracting baby boomers to your fair or festival Paper presented at Michigan Festivals and Events Association 8th Annual Convention, Nov. 2-5, 2000, Kalamazoo, MI

Wood W R Jul 29, 2002 Juicy jolt; Peach lovers find their own piece of heaven *Kalamazoo Gazette* C1.